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Organic growth to take center stage at T3 conference

By Rob Burgess

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One of the marquee annual events of the wealth management industry kicks off at the start of next month just over two decades after it first began.

Returning for the 21st year, the Technology Tools for Today (T3) Conference is scheduled for March 3 to 6 in Dallas.

Joel Bruckenstein, T3 president, said the theme for this year's event will be "The Organic Growth Imperative." He said the focus on organic growth, not just M&A, is important "if advisors want to thrive and capture the attention of next-generation clients."

"To my mind, when it comes to organic growth, it's all about the tech," said Bruckenstein.

Highlighting additional services

The annual T3 survey is a regular highlight of the conference, the findings of which Bruckenstein and Bob Veres, publisher of Inside Information, will present at the end of the day on March 4.

Last year's survey was notable because it included data on tax and estate planning software for the first time. Bruckenstein said it's more important than ever for advisors to add additional services like these to attract and retain clients.

On that note, Ian Cooper, car consultant with YCH Auto Advisors, will deliver a presentation at T3 on the afternoon of March 3 on "Navigating the Auto Buying Process: Protecting Clients from Dealership Tactics and Financial Pitfalls."

"This is a service that a lot of advisory firms should be offering, and they're not," said Bruckenstein. "There is fee compression because [advisors are] forced to provide more value for the fee. So something like a car concierge, to me, is a real value-add. Services like that are easy to add, and there's no real cost to the advisor."

What advisors are saying

Christopher Hensley, president and CEO of Houston First Financial Group in Bellaire, Texas, said he is "super excited" to be attending T3 for the first time this year.

"It takes a lot to get me out of the office these days, but technology has evolved so rapidly in recent years that I think it's crucial to stay ahead of the curve," he

said. "Having the best solutions available for my clients isn't just a priority — it's a necessity. Technology is a force multiplier and one of the strongest leverage points a smaller practice like mine can have. I love being nimble with my tech stack, unlike the larger firms that need a committee of 10 just to decide what to order for lunch."

And while advisors including Hensley are traveling to T3 from just a few hours' drive away, others are making a much longer trek.

Robert Levitt, founder of Levitt Capital Management in Nice, France said he is headed to his first T3 conference "for the opportunity to see the latest and greatest in the world of advisor technology, as well as to convince certain software vendors to consider a firm that is outside the U.S."

"Our firm is based in France, although our clients are U.S. citizens," he said. "More advanced or sophisticated firms understand the global marketplace, but many, even large firms, remain like deer in the headlights when a firm arrives that is outside the box. Seeing us in person and getting to know what we do can open a lot of doors for us."

Optimizing tech stacks for productivity

Hensley said he actively tracks his entire tech stack in the productivity software Notion, maintaining a detailed spreadsheet that includes costs, tools and whether he's using all available integrations.

"To me, it's not just about having the latest tools — it's about ensuring I maximize what I already have," he said. "If I can do something for less, I will. But often, newer best-in-class solutions emerge that outperform legacy tools we've simply grown accustomed to using. If I've used a software for 20 years and they raise prices, that's my trigger to reevaluate and see if there's something better."

For example, Hensley said custom indexed portfolio creation solution Syntax Direct, which debuted at last year's T3 conference in Las Vegas, has been a "game changer."

"[It allows] me to build and manage direct indexes at scale — something that would have been out of reach just a few years ago," he said.

Patrick Shaddow, president and CEO of Syntax Data, will present at T3 on the morning of March 4 and the afternoon of March 5.

"I call them the 'Intel Inside' of direct indexing," said Bruckenstein about Syntax Data. "They have some unique intellectual property that every advisor should be using."

AI tools will remain a focus

Unsurprisingly, artificial intelligence will also be heavily featured at T3. James Dean, AI sales and engineering executive at Google, will take the main stage on

the afternoon of March 4.

Bruckenstein said he is interested to see where AI is headed next, now that advisors have had a few years to try out the technology to see what works for them.

"At the beginning, all of a sudden, there were half a dozen or more note-taking apps," he said. "People are using those and forming their opinions. Some of them are already on the second note-taking app. They fired one and went to a second one. AI is everywhere, to a greater or lesser extent, in just about every product where it makes sense to have it."

Hensley said like many advisors he loves his AI-powered note-taker, "but what's even better are the innovations we don't even know about yet."

"That's why I'm excited to see what the smartest minds in fintech are bringing to the table at T3," he said. "What's the next tool that will truly surprise me? What's going to blow my clients away?"

Other highlights

In addition to organic growth and AI, topics like cybersecurity, portfolio management, retirement planning and many others will be covered both on stage and in the exhibit hall, which will feature dozens of booths.

One of the most talked about recent events in the industry, Robinhood's acquisition of TradePMR, will take center stage during a general session featuring Steve Quirk, chief brokerage officer of Robinhood, and Robb Baldwin, founder and CEO of TradePMR.

Attendees can also expect to hear from industry luminaries including Amy Young of Microsoft, Kay Lynn Mayhue of Merit Financial Advisors, Larry Roth of RLR Strategic Partners, Kevin Knull of TaxStatus, Dan Moisand of Moisand, Fitzgerald, Tamayo Financial Planning & Wealth Management, Leo Rydzewski of the CFP Board, Jeff Coyle of Libretto, Michael Batnick of Ritholtz Wealth Management, Craig Cintron of Goldman Sachs, Bob Curtis of GetWyz, Gerard Michael of Smartleaf, and Matt Bankston of client solutions at Choreo Advisors.